

Case Closure Edits			
Edit Message	Where to Look...	What to do...	Note...
1. Worker has Pending Approvals.	1. Click Approvals expando 2. Click Pending Approvals for "Your Name" icon	<p>If your case is in Pending Approvals for "Your Name":</p> <ol style="list-style-type: none"> 3. Click Case icon 4. Click the piece of work icon (e.g. Assessment) 5. Click the piece of work 6. Click the approval line of the piece of work 7. Select Approval from the Options list 8. Click Go button 9. Select Approve 10. Click Continue>Save> Close 	<ul style="list-style-type: none"> • Your work must go through all levels of approval process before the case will close.
		<p>If your case is <u>not</u> in your worker Pending Approvals for "Your Name":</p> <ol style="list-style-type: none"> 1. Click Approvals History icon 2. Click the piece of work icon (e.g. Assessment) 3. Click the piece of work to display the approval history 4. Verify if it needs to be approved by a supervisor 	

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2. Child's In Home Placement needs to be ended and approved.	1. Click Case expando 2. Click Case icon 3. Click Placement/ Services icon	<p>If the In Home Service status is Pending:</p> <ol style="list-style-type: none"> Click In Home Service link for the child Select Approval from the Options list Click Go button Select Approve Click Continue>Save>Close Perform steps 10-17 	<ul style="list-style-type: none"> In Home Services must be ended for all children in the case.
		<p>If the In Home Service status is Approved:</p> <ol style="list-style-type: none"> Click In Home Service link for the child Select Service Ending from the Options list Click Go button Enter appropriate data to end placement Select Approval from the Options list Click Go button Select Approve Click Continue>Save>Close 	<ul style="list-style-type: none"> In Home Service closings must go through all levels of approval process before the case will close.

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3. Child's final Out of Home Placement needs to be ended and approved.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon 3. Click Placement/Services icon 	<p>If the Out of Home Placement status is Pending:</p> <ol style="list-style-type: none"> 1. Click Out of Home Service link for the child 2. Follow steps 4-8 for In Home Services 3. If the Out of Home Placement status is Approved: 4. Click Out of Home Placement link for the child 5. Select Service Ending from the Options list 6. Click Go button 7. Select End Reason 8. Select Discharge Reason 9. Select Approval from the Options list 10. Click Go button 11. Select Approve 12. Click Continue>Save>Close 	<ul style="list-style-type: none"> • Out of Home Placements must be ended for all children in the case. • Is the End of This Child Placement a Discharge from All Placements? Radio button will default to "Yes" based upon the End Reason selected for the ending of the Out of Home Placement. The Discharge Reason field will be enabled and required to end the placement. • Out of Home Placement endings must go through all levels of approval process before the case will close.
4. Placement with the end reason of 'Adoption' must have a Legal Status record of the finalized Adoption prior to case closure.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case link to access Maintain Case page>Participants box <p>Find participant(s) with legal status indicating child is on an order of supervision/custody</p>	<ol style="list-style-type: none"> 1. Click Case Work menu 2. Select Legal Status in the Legal list>Case>Case Participant 3. Click Create 4. Complete Legal Status page to indicate the participant's placement ended as a result of a finalized adoption 	<ul style="list-style-type: none"> • A Legal Status can only be created if a Legal Action has been created. • A Legal Status doesn't go through the approval process.

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5. Child's final placement is missing a discharge reason	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon 3. Click Placement/ Services icon 4. Click Out of Home Placement for the person listed in error link 5. Select Service Ending from Options list 6. Click Go 	<p>If the Discharge Reason is not completed on the Service Ending page, continue with steps 7-12:</p> <ol style="list-style-type: none"> 7. Check Override box 8. Select Discharge Reason from list 9. Select Approval from Option list 10. Click Go button 11. Select Approve radio button 12. Click Continue>Save>Close 	
6. Plan(s) need to be Terminated and/or approved.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon 3. Click Planning icon 4. Identify the plan(s) that has a status of "pending" or "ongoing" 	<p>If the Plan status is Pending, see "<i>What to do ...</i>" for Edit Message # 1</p> <hr/> <p>If the Plan status is Ongoing:</p> <ol style="list-style-type: none"> 7. Click Plan - Ongoing link 8. Select Terminate from the Options list 9. Click Go button 10. Select the Reason Plan Is No Longer Required from list 11. Select Approval from Option list 12. Click Go button 13. Select Approve radio button 14. Click Continue>Save>Close 	<ul style="list-style-type: none"> • Pending plans must go through all levels of approval process AND the Plan must be terminated. • Terminated plans must go through all levels of approval process before the case will close.

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7. Final Family Assessment is missing.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon 3. Click Closing History tab 4. Maintain link 5. Case Closure page 	If the “ Check Here if Completion of Final Family Assessment Is Not Required ” checkbox is <u>not</u> checked, a Final Family Assessment needs to be completed for the case.	<ul style="list-style-type: none"> • To complete a Final Family Assessment, select Final FA from the Options list, and then click the Go button.
8. Final Safety Assessment is missing.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon 3. Click Closing History tab>Maintain link 4. Case Closure page 	If the “ Check Here if Final Safety Assessment Is Not Needed ” checkbox is not checked a Final Safety Assessment needs to be completed for the case.	<ul style="list-style-type: none"> • To complete a Final Safety Assessment, select Safety from the Options list, and then click the Go button.
9. Close/Merge Failed – Reference Person ID’s different in Remove Case: <case number> Retain Case : <case number>	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case link for the case you want to <u>remove</u> 3. Access Person Management page for the Reference Person 4. Identify the Participant ID 5. Repeat steps 1 – 3 for the person you want to <u>keep</u> 	<p>If the Participant ID is different for each Reference Person:</p> <ol style="list-style-type: none"> 1. Select Merge Person on Utilities menu 2. Click Search link in Remove box 3. Search for the Participant ID of the person you want to <u>remove</u> 4. Select person radio button 5. Click Continue 6. Repeat steps 2 & 5 for the person you want to <u>keep</u> 7. Click Save >Yes >Close 	<ul style="list-style-type: none"> • The Reference Person must have the same Participant ID in both cases when merging 2 cases. • The Merge Person function is an overnight batch process. • If there are more than 2 people that need to be merged, you cannot merge the 3rd person until after the first merge is completed.

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10. Close/Merge Failed – Missing Reference Person.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case icon to access Maintain Case page/Participants box 	<ol style="list-style-type: none"> 1. Select one person to be the Reference Person from the Relationship dropdown list 	<ul style="list-style-type: none"> • The Reference Person must have the same Participant ID when merging 2 cases. You may have to perform a Person Merge for the Reference Persons before you can merge the cases. • The Merge Person function is an overnight batch process.
11. Close/Merge Failed – A CPS case can never be merged into a TPR case.	<ol style="list-style-type: none"> 1. Click Case expando 2. Identify the CPS case into which the TPR case needs to be merged 3. Click Case link to access the Maintain Case page/Participants box 4. Find the participant(s) with the Legal Status that indicates the participant(s) is still in agency supervision/custody 	<p>If the CPS case <u>does not</u> have a participant with the Legal Status that indicates the participant(s) is still in protective custody then this is not the original case and <u>cannot</u> be merged with the TPR case.</p> <p>Perform steps 1-4 until you find the CPS case that has participant(s) with the Legal Status that indicates the participant(s) is still in agency supervision/custody. If you find this case, then that case <u>can</u> be merged with the TPR case.</p>	

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12. Payment is missing final Approval.	<ol style="list-style-type: none"> 1. Click Provider expando 2. Click Provider icon 3. Click Payment Request icon 4. Click Payment link 	On the Payment Request page <ol style="list-style-type: none"> 5. Select Approval in Options list 6. Click Go button 7. Select Approve radio button 8. Click Continue>Save>Close 	
13. Legal Status shows Participants are in Protective Custody.	<ol style="list-style-type: none"> 1. Click Case expando 2. Click Case link to access Maintain Case page/Participants box 3. Find the participant(s) with the Legal status that indicates the participant(s) is still in agency supervision/custody 	<ol style="list-style-type: none"> 1. Click Case Work menu 2. Select Legal Status in Legal list>Case>Case Participant 3. Click Create 4. Complete Legal Status page to indicate the participant(s) are no longer in agency supervision /custody 5. Click Save>Close 	<ul style="list-style-type: none"> • A Legal Status can only be created if a Legal Action has been created. • Changes in a participant's legal status don't go through the approval process.

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14. AFCARS data is incomplete.	<ol style="list-style-type: none"> 1. Click Ticklers expando if ticklers are not displayed 2. Locate Case icon for your case 	<ol style="list-style-type: none"> 1. Click Case icon for your case with AFCARS ticklers under Ticklers expando 2. Write down the Child's Person ID associated with AFCARS ticklers 3. Access Utilities menu and select AFCARS option. 4. Search out child using the Person ID 5. Click appropriate Person Icon 6. Click person's Cases Icon 7. Select the appropriate case 8. Click Continue 9. Consult <i>"User Guide – How to Correct AFCARS Data Errors"</i> 	<ul style="list-style-type: none"> • Step 2 - The Child's Person ID is the number in parentheses within the AFCARS Exception message. • Step 6 - If the child is in multiple cases, select the case that is listed under your Tickler expando. • The <i>"User Guide – How to Correct AFCARS Data Errors"</i> is in the WiSACWIS Knowledge Center which can be accessed from your WiSACWIS Desktop.

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15. Screened in PS Report is missing Assessment.	1. Click Case expando 2. Click Case icon	If there <u>isn't</u> an Assessment icon: 3. Click Case Work menu 4. Select Assessment in Assessment list > Case 5. Click Create 6. Select check box for CPS Report in Assessment Report Link page 7. Click Create 8. Complete all required fields on each tab 9. Click Save > Close	<ul style="list-style-type: none"> Your work must go through all levels of approval process before the case will close.
		If there <u>is</u> an Assessment icon: 10. Click Assessment icon 11. Click Assessment-Pending link 12. Select Approval in Options list 13. Click Go button 14. Select Approve radio button 15. Click Save > Close	

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16. Legal Status of Adoption Finalized is missing.	1. Click Case expando 2. Click Legal link to view Legal Status.	3. Click Case Work menu 4. Select Legal Status in Legal list> Case>Case Participant 5. Click Create 6. Complete Legal Status of Adoption Finalized. Click Save>Close	<ul style="list-style-type: none"> • A Legal Status can only be created if a Legal Action has been created. • Changes in a participant's legal status don't go through the approval process.